



First American

COMPANY ADMINISTRATION GUIDE

Rev. 201802

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Overview

This guide will provide the steps necessary for a customer administrator to manage:

- Company preferences and available reports
- Users and groups
- Usage
- Billing and credit cards, if necessary

Contact DataTree Customer Service at 800.708.8463 for more help with your DataTree account.

Before You Begin

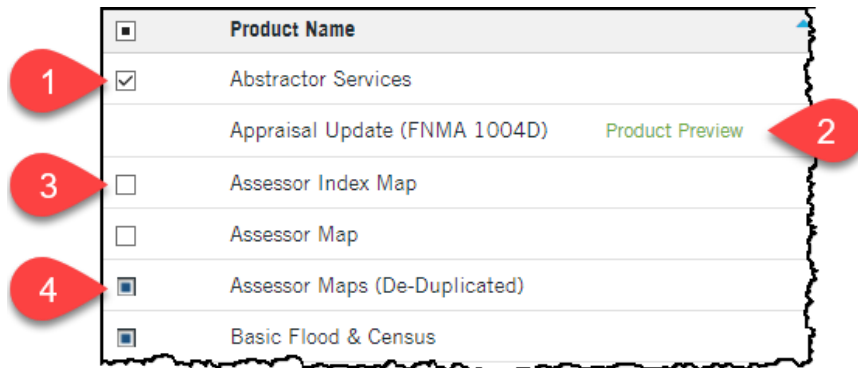
This manual covers information available only to Company Administrators or Group Managers.

Some tables include column headers which can sort the information (1, unsorted). Click on the column header to sort ascending (2) or descending (3).

Pencil icons (4) indicate an editable field.



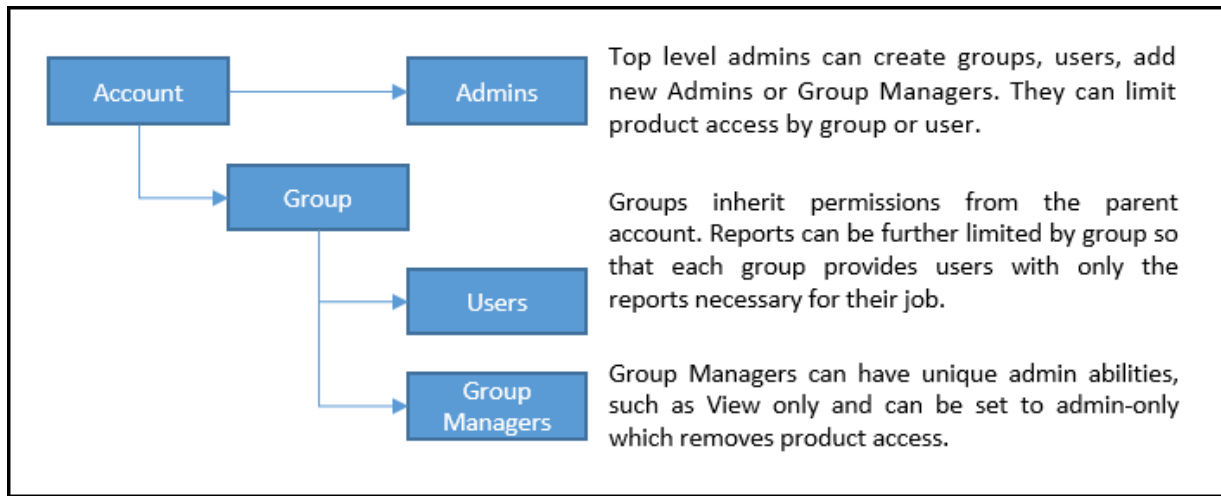
Tables with selections can be setup several different ways for end users:



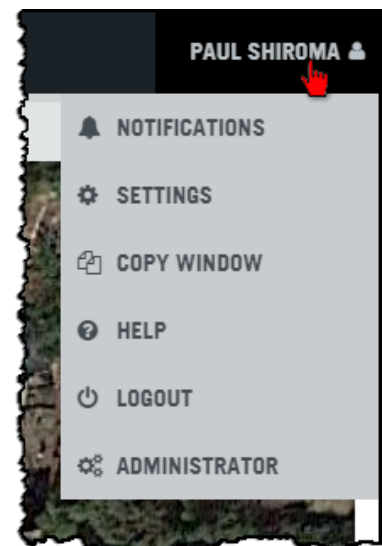
1. Checked	Product available and orderable in the left hand panel of DataTree.
2. No Check Box / Product Preview	Product only shows a sample. Contact your Account Manager to provision this as the service is not part of your contract.
3. Unchecked	Available for your contract but not enabled for your end-users. Click to put a check in the box and enable it for your users.
4. Checkbox blocked out	Product available but enabled for only some users and groups.

If you make any modifications, make sure you click Save before leaving the page.

Below are details on how users and groups are used in DataTree.



To access the Company Administration tools, click the Profile menu at the top right hand corner of the window and select Administrator.



The navigation bar at the top of the Administration page includes options to manage your account, users, group, usage and billing.

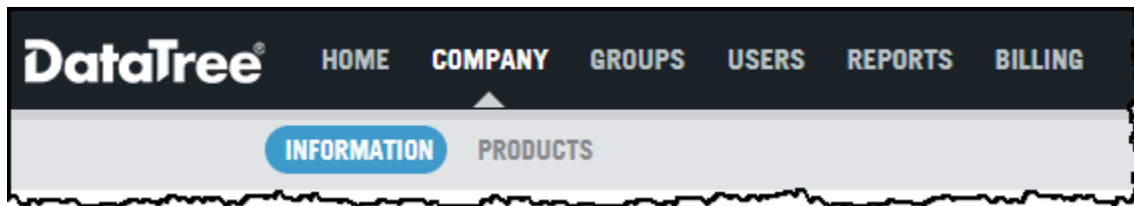


Home:	Exit the administration page and return to the product home page.
Company:	View and manage company information, preferences, admins, audit activity and products.
Groups:	View, create and manage groups. Add users to groups. View audit activity by group.
Users:	View, create, suspend, move and manage users; assign users to groups; reset passwords.
Reports:	View and export usage and user account lists.
Billing:	View and manage billing, payment options, and billing contacts.

The manual will review each option in turn. When you are finished with your administration tasks, click the Home menu or click the Profile menu and click Logout to exit DataTree.

Company and Product Information

The Company option allows updates to your company information, preferences, adding administrators, links and an audit trail.



Company Information:

See the table following for information on each section.

Company Information

1 **COMPANY INFORMATION**

First

CA 92708

Account #:

Primary Phone: -6648

2 **COMPANY PREFERENCES**

Preference	Enable	User Preference
Property Detail Autoload	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Property Photo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Graphs & Maps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Listing Data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Estimated Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CA Compliant Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cover & Logo Editing	<input checked="" type="checkbox"/>	
Batch Disclaimer	<input checked="" type="checkbox"/>	
Custom Links	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3 **ADMINISTRATORS** [Add](#)

User	Email	Edit
Shawn Sing...		<input type="text"/>
Salhieh Rami		<input type="text"/>
vijay Kumar...		<input type="text"/>
Isaiah Barney		<input type="text"/>
Matt Key		<input type="text"/>
Sharmila_test		<input type="text"/>
Shawn Sing...		<input type="text"/>
Mitchell Sh...		<input type="text"/>
Amanda Price		<input type="text"/>
Hugo Yeh		<input type="text"/>

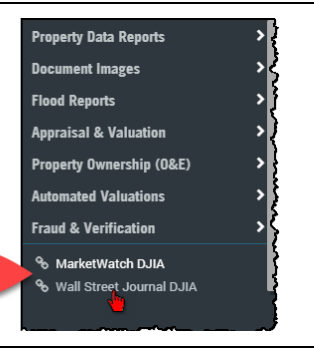
4

Custom Link - Display Name	Custom Link - URL
MarketWatch DJIA	https://secure.marketwatch.com/investing/index/djia
Wall Street Journal DJIA	http://quotes.wsj.com/index/DJIA
<input type="text"/>	<input type="text"/>

5 Require Reference #

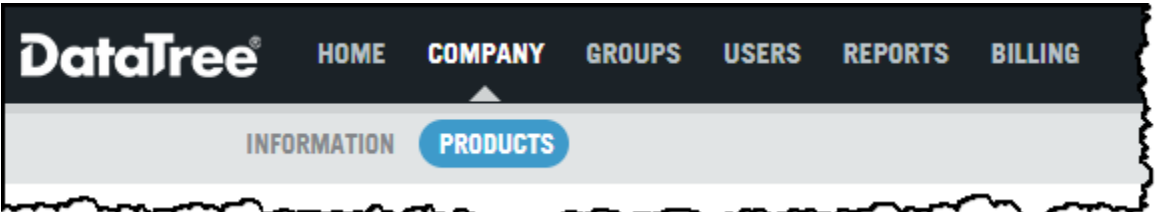
6 [Cancel](#) [Save](#)

1.	Basic company information.
2.	Features that can be activated or deactivated for all users and groups. These may be features that are not permitted for certain uses by local or state regulations. Enable indicates that the feature shows for all users/groups. Selected User Preference allows users to turn the feature on or off independently.
3.	A list of administrators for your company. Click Add to create and add new administrators. Click the pencil to edit an administrator.

4.	Allows the addition of custom links to the left hand product panel as shown below.	
5.	Requires users to enter a reference number for billing purposes. The reference number will show on the usage and invoice.	
6.	Save or Cancel	

Products

The list of available products is governed by your company’s DataTree contact. As the company administrator, you can add or remove access to these reports within the limits of your contract.



In the Products list, you can enable or disable reports available to your users. Make sure to click Save after making any modifications. As the list can be extensive, use the Search field to help you find the service.

Products Save for all users

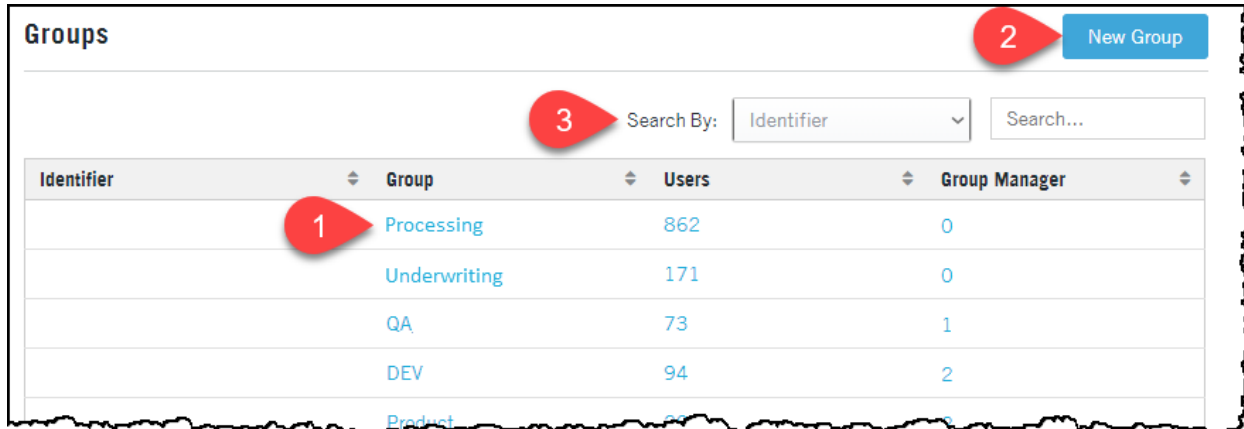
COMPANY PRODUCTS Search By: Product Name

<input type="checkbox"/>	Product Name	Product Type	Price
<input type="checkbox"/>	One-time Editing	Authorized Services	
<input type="checkbox"/>	Batch Ordering	Authorized Services	
	Last Transfer Document Product Preview	Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Last Finance Document	Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Assessor Map	Recorded Documents	\$0.90
	Specific Document Product Preview	Recorded Documents	\$1.00

Groups

Groups allow you to organize users and have the following attributes:

- Unique permissions that limit user(s) to specific reports or services.
- Require a reference number for any order made by the group's users.
- Group Managers to manage that group (or groups).

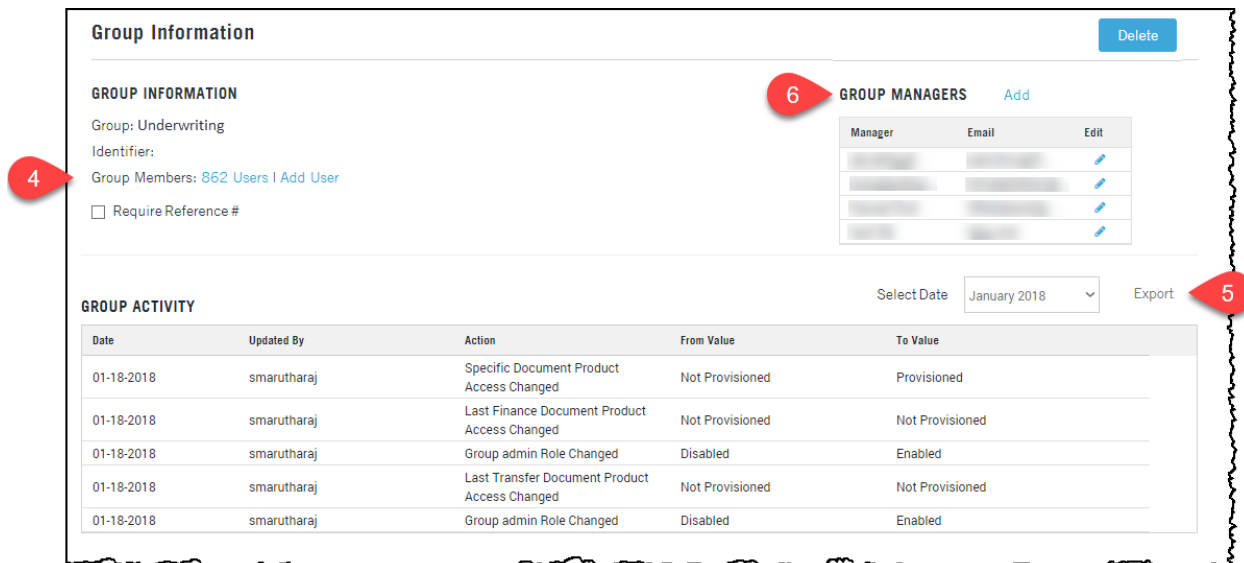


Identifier	Group	Users	Group Manager
	Processing	862	0
	Underwriting	171	0
	QA	73	1
	DEV	94	2
	Product	69	5

Click on any group (1) to add users or view an audit trail of the group activity. You can create new groups by clicking New Group (2) or search for groups (3).

Group Information

If you click on a group (1, above), the Group Information page will load. Click either the number of group members or the Add Users link (4) to manage existing or add users, respectively. Click Export (5) to export the audit trail for a selected month. You can add or edit Group Managers (6).



GROUP INFORMATION

Group: Underwriting
Identifier:
Group Members: 862 Users | [Add User](#)
 Require Reference #

GROUP MANAGERS [Add](#)

Manager	Email	Edit
		Edit
		Edit
		Edit
		Edit

Select Date: January 2018 [Export](#)

GROUP ACTIVITY

Date	Updated By	Action	From Value	To Value
01-18-2018	smarutharaj	Specific Document Product Access Changed	Not Provisioned	Provisioned
01-18-2018	smarutharaj	Last Finance Document Product Access Changed	Not Provisioned	Not Provisioned
01-18-2018	smarutharaj	Group admin Role Changed	Disabled	Enabled
01-18-2018	smarutharaj	Last Transfer Document Product Access Changed	Not Provisioned	Not Provisioned
01-18-2018	smarutharaj	Group admin Role Changed	Disabled	Enabled

Note that if you click Add User or Add (Group Managers), it presumes the user account already exists. Use the search dialog to find the account user? to add it to the Group.

Group Products

Groups can further limit which reports are available to the group's membership. This will be useful to ensure that only the reports necessary for a team or role are available, thereby limiting unnecessary orders. Select or deselect checkboxes as required to limit access to reports or services. Make sure to click Save when you are finished.

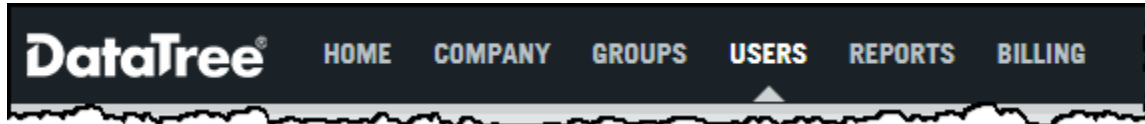
Products Save

UNDERWRITING Search By:

<input checked="" type="checkbox"/>	Product Name		Product Type	Price
<input checked="" type="checkbox"/>	One-time Editing		Authorized Services	
<input checked="" type="checkbox"/>	Batch Ordering		Authorized Services	
	Last Transfer Document Product Preview		Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Last Finance Document		Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Assessor Map		Recorded Documents	\$0.90
	Specific Document Product Preview		Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Assessor Index Map		Recorded Documents	\$0.00
<input checked="" type="checkbox"/>	Abstractor Services		Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Market Statistics Report		Property Reports	\$0.00
<input checked="" type="checkbox"/>	Single Line Report		Property Reports	\$0.00

Users

How to create, manage, or suspend user accounts.



In the Users list, you can add a new user (1), add users in bulk via a spreadsheet (2), Move users to a different group?, Reset Passwords, or Suspend one or more user accounts (3), manage an existing user (4), jump to that user's group (5), or reactivate suspended user accounts (6).

Name	Identifier	Role	Group	Email	Username	Status
<input type="checkbox"/> Anna Andreu			Client Serv...	AAndreu	AAndreu	Active
<input type="checkbox"/> Arika Ankeshwa...			FAI DTDB ...	aankeshwarapu@...	aankeshwarapu	Active
<input type="checkbox"/> Angie Berrera			Client Serv...	aberrera	aberrera	Suspended Reactivate
<input type="checkbox"/> Austin Cho		Admin	Admin	ACho	ACho	Active
<input type="checkbox"/> Annette Cotton		Admin	Admin	ACotton	ACotton	Active
<input type="checkbox"/> Art Diaz		Admin	AST	ADiazJr	dt_ADiazJr	Active

Modifying Existing Users

You may edit the properties of an existing user by clicking on their name (1).

Name	Identifier	Role	Group	Email	Username	Status
Mariana Tram...	12345	Gr	124567	madfadfaf@xma...	madfadfaf@xma...	Active

(Details follow on the next page)

Existing User Settings?

The screenshot shows a user settings form with the following elements:

- 1:** Role selection: Administrator, Group Manager. A checkbox for Don't allow product access.
- 2:** Group selection: ABC_Group
- 3:** Permissions selection: Add/Suspend User, Modify Provisioned Products
- 4:** Name: Mariana, Email: madfadfaf@xmafil1.com, Identifier: 12345. Require Reference #
- 5:** Username: madfadfaf@xmafil1.com, Group: 124567
- 6:** Action buttons: Reset Password, Suspend User, Cancel, Save

1	<p>Change the role of the individual by selecting or deselecting the Administrator or Group Manager. A Group Manager may be restricted to admin only access. Checking the Don't Allow Product Access box removes their product access. In the above example, this user is limited to group management and does not have product access. Leave all boxes unchecked for a standard user.</p> <p>Administrators have the ability to add, modify, suspend user accounts, create groups, and modify access to reports. Group Managers can perform a similar function for a group.</p>
2	<p>If you are using groups, a Group Manager may be assigned to manage more than one group for. If you are not using groups, ignore this option.</p>
3	<p>If you are using group managers, you can limit the permissions available to a group manager. The example shows a group manager with two permissions. Click inside the permissions list to reveal the other available permissions and click to add. Click the "x" to remove permissions.</p>
4	<p>You may edit the Name, Email, and Identifier or enable/disable the reference number. The Username is not editable.</p>
5	<p>If you are using groups select the group from which they will derive their product access.</p>
6	<p>Click to send a Reset Password link to users who forgot their password.</p> <p>You may suspend users who are no longer with the company or no longer need access to the platform.</p> <p>Finally, make sure to Save any changes.</p>

See the following section on Product Access for Existing Users.

At the bottom of the User Information page is the user activity, or audit trail, showing what changes have been made to the users access. (if that is correct?)

USER ACTIVITY Select Date

Date	Updated By	Action	From Value	To Value
01-23-2018		User Business Unit Changed		Database Solutions
01-23-2018		User ApproveSales Role Changed	Disabled	Enabled
01-23-2018		User CustomerService Role Changed	Disabled	Enabled
01-23-2018		User SiteAdmin Role Changed	Disabled	Enabled
01-23-2018		User Business Unit Changed	Database Solutions	
01-23-2018		User ManagedServices Role Changed	Enabled	Disabled
01-23-2018		User ApproveFinance Role Changed	Enabled	Disabled
01-23-2018		User DataTreeSales Role Changed	Enabled	Disabled

Existing User Product Access

You may update or modify the products a user may access by selecting or deselecting the checkboxes next to the product names. Use the Search By drop down to search for specific products or by Product Type. Click column headers to sort the information..

Products that do not have a checkbox are not provisioned at your company’s contract level. Contact your Account Manager if you want to enable these products.

INFORMATION **PRODUCTS**

Products

MARIANA'S PRODUCTS Search By:

<input type="checkbox"/>	Product Name	Product Type	Price
<input checked="" type="checkbox"/>	One-time Editing	Authorized Services	
<input type="checkbox"/>	Batch Ordering	Authorized Services	
	Last Transfer Document Product Preview	Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Last Finance Document	Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Assessor Map	Recorded Documents	\$0.90
	Specific Document Product Preview	Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Assessor Index Map	Recorded Documents	\$0.00

Creating New Users

Click New User to create a new user (1).

Complete the User Information (1) and Product (2) access. Before you click save, make any changes required to the product access (continued on following page).

Administration / Group Manager	Leave both boxes unchecked for a standard user. Administrators have the ability to add, modify, suspend user accounts, create groups, and modify access to reports. Group Managers can perform a similar function for a group.
Name:	This will be different from the username, below.
Email:	The email will also be added as the Username.
Username:	The default is the email address; it can be overwritten.
Identifier:	Any identifier your company requires. This is an optional field.
Require Reference #	Enable if you want a user-entered reference number for every order. The number will show on the usage and billing.
Group:	Select the group for this user. If none is selected, the user will be added to the Miscellaneous group (default).

Product Access

Select or deselect which reports the user can access. Use the search option to look for specific reports and remember that you can sort by column header.

Products			
USER PRODUCTS			
		Search By:	<input type="text" value="Product Name"/> <input type="text" value="Search..."/>
<input checked="" type="checkbox"/>	Product Name	Product Type	Price
<input checked="" type="checkbox"/>	Abstractor Services	Recorded Documents	\$1.00
<input checked="" type="checkbox"/>	Assessor Index Map	Recorded Documents	\$0.00
<input checked="" type="checkbox"/>	Assessor Map	Recorded Documents	\$0.90
<input checked="" type="checkbox"/>	Last Finance Document	Recorded Documents	\$1.00

Click Save when you are finished.

Bulk Upload of New Users

If you have a large number of users to add to DataTree, click the New Bulk Users menu option. This will provide a spreadsheet in the New Bulk Users dialog box.

NEW BULK USERS

SELECT GROUP

Group

SELECT BATCH USERS FILE

Need the Excel template? [Download it](#)

Select a group (1) in which to add the users. If you are not using groups, leave this entry blank. This must be populated if the user is a Group Manager. If user is an admin, do not select.

Download the template (2) and complete the information in the spreadsheet.

Make sure to read the instructions. Save the spreadsheet.

When you are ready, click Upload (3) and upload your completed list.

The new users will automatically receive their credentials over email.

After your users have been uploaded, you can adjust their report access as outlined above.

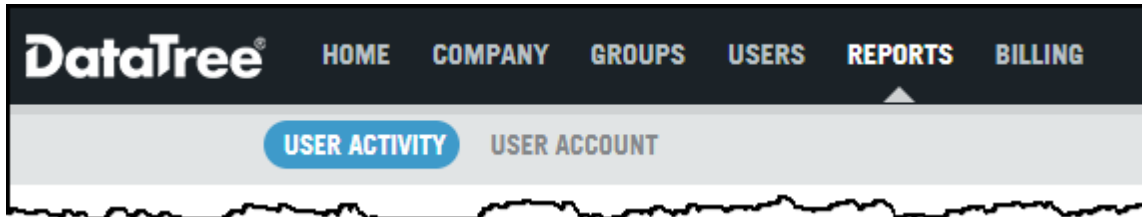
	A	B	C	D
1	Name	Email	Identifier	
2				
3				
4				
5				
6				
7				
8				
9				
10				
11	Instructions:	Maximum of 100 users may be uploaded in a file		
12		Name and Email Address are required fields		
13		Email address will be used as the Username		
14		Remove these instructions prior to uploading your input file.		
15				

Reports

The Reports section provides usage information that you can export by user or group.



View the information by user activity or by user account.

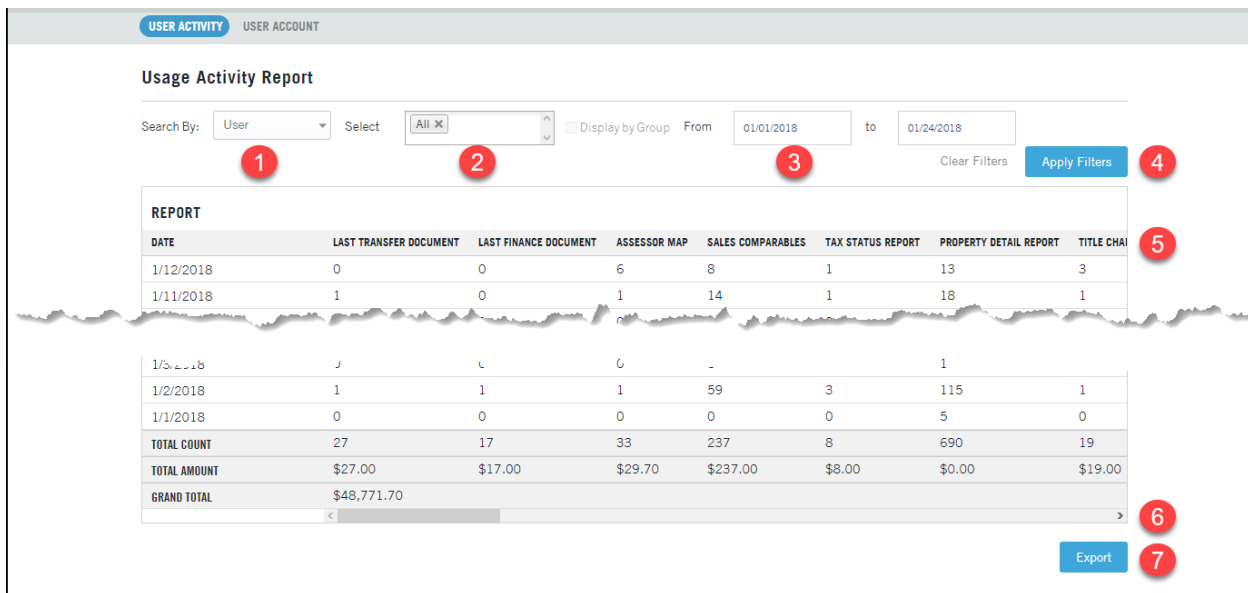


View User Activity

In the User Activity window, you may filter the list by User or Group (1), select specific users or groups to view (2) along with a date range (3). Click Apply Filters (or Clear Filter, 4).

The table (5) will display the filtered results. Note that you can scroll to the right/left to view the entire table (6).

When you are ready, click Export (7).



The screenshot shows the 'Usage Activity Report' interface. At the top, there are tabs for 'USER ACTIVITY' and 'USER ACCOUNT'. Below the tabs, the report title 'Usage Activity Report' is displayed. The interface includes a search filter section with a dropdown menu set to 'User' (1), a 'Select' dropdown menu with 'All X' (2), a 'Display by Group' checkbox, and date range fields 'From 01/01/2018 to 01/24/2018' (3). There are 'Clear Filters' and 'Apply Filters' buttons (4). Below this is a table (5) with the following data:

DATE	LAST TRANSFER DOCUMENT	LAST FINANCE DOCUMENT	ASSESSOR MAP	SALES COMPARABLES	TAX STATUS REPORT	PROPERTY DETAIL REPORT	TITLE CHAI
1/12/2018	0	0	6	8	1	13	3
1/11/2018	1	0	1	14	1	18	1
1/8/2018	0	0	0	-	-	1	-
1/2/2018	1	1	1	59	3	115	1
1/1/2018	0	0	0	0	0	5	0
TOTAL COUNT	27	17	33	237	8	690	19
TOTAL AMOUNT	\$27.00	\$17.00	\$29.70	\$237.00	\$8.00	\$0.00	\$19.00
GRAND TOTAL	\$48,771.70						

At the bottom right of the table, there is a scroll bar (6) and an 'Export' button (7).

You can search by User or Group by changing the option in the Search By drop down and entering the user or group name(s) in the Select field.

Search by User:

The screenshot shows a search interface with a 'Search By:' dropdown menu set to 'User'. To the right is a 'Select' field containing 'All x'. Further right is a checkbox labeled 'Display by Group' which is currently unchecked.

Search by Group:

The screenshot shows a search interface with a 'Search By:' dropdown menu set to 'Group'. To the right is a 'Select' field containing 'Click/Type Group Name'. Further right is a checkbox labeled 'Display by Group' which is currently unchecked.

Options:

Selecting "All" will pull the company billing plus all billable groups.

Selecting "Company" will show all users and groups that are billed under the company billing.

A close-up of the 'Select' dropdown menu showing two options: 'All' and 'Company'.

User Account

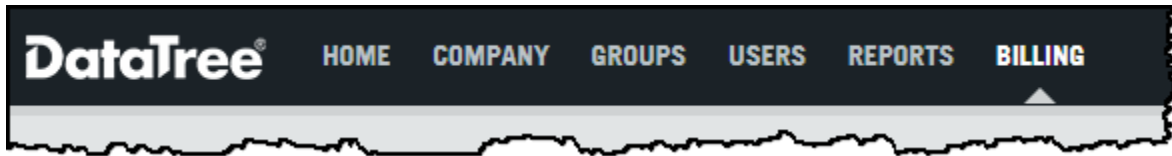
You can also export usage by end user. Adjust the total number of rows per page (1) as required. Click to sort the column headers (2). Your list might be extensive and if you are looking for a specific user or set of users, the Search By (3) feature will be handy. Click Export (4) when you have the information you require. Your file will be exported as a .csv file. Different browsers handle the download process differently. Check your browser settings for download settings.

The screenshot shows the 'User Account Report' interface. It includes a 'REPORT' section with a 'Show 50 entries' dropdown (1). Below is a table with columns: Account #, Group, Name, User ID, Identifier, Role, Status, Created, Last Login, and Contact Email. A table row is highlighted with a red circle (2). To the right of the table is a 'Search By:' dropdown set to 'Account #' and a search input field (3). In the top right corner, there is an 'Export' button with a red circle (4).

Account #	Group	Name	User ID	Identifier	Role	Status	Created	Last Login	Contact Email
2000001	DEV	Shawn				Active	10/31/2011	01/16/2018	
2000001	Product Management 1	Isaiah				Suspended			
2000001	Admin	Matt				Active	12/01		

Billing

The Billing pages allow you to update billing contacts, view billing history, make payments and manage the credit card used (if required).



In the Billing Overview page, you may edit and delete existing Billing Contacts (1) or add new contacts (2).

You may make a payment (3) or manage the card (4) from this page as well. Your billing history will be listed (5) in the lower half of the page. The Billing History is filterable by year.

The screenshot shows the 'Billing Overview' page. At the top left is the title 'Billing Overview'. To the right are two blue buttons: 'Make a Payment' (callout 3) and 'Card Manager' (callout 4). Below the title is a section for 'Billing Contacts' containing two entries: 'Sreekanth ksreekanth@firstam.c...' and 'SriBasappa sbasappa1@firstam.co...'. Each entry has edit and delete icons, and a red callout '1' is placed over the delete icon. Below the contacts is a link 'Add Billing Contact' with a red callout '2'. To the right of this link is a 'Select Date' dropdown menu currently set to '2018'. Below this is a 'Billing History' section with a red callout '5'. It contains a table with columns 'Invoice Date', 'Invoice #', and 'Group'. The table body is empty, showing 'No Payment and Billing History'. At the bottom right of the page are two more blue buttons: 'Make a Payment' and 'Card Manager'.